

MHC Drupal User Manual: Webforms

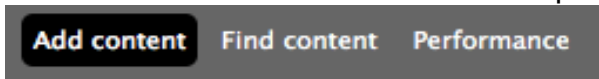
These instructions are not inclusive of all webform features that may be available. If you need assistance in creating webforms, or if you want to provide options on your forms that may be available, but are not included in this documentation, email the College Web Team at: webhelp@mtholyoke.edu.

There are four main steps to create a Webform:

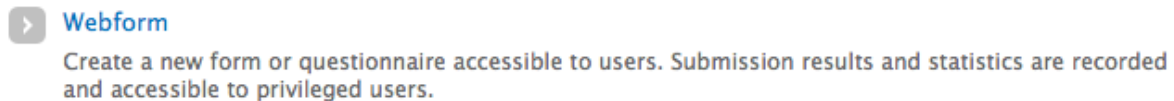
1. Create the webform page.
2. Add webform components (questions).
3. Add receipt page content.
4. Add form submission recipients.

1. Create Webform Page

A. Click on the **Add Content** link at the top of the personal menu.



B. Select **Webform** from the list of content types.



C. Complete the Webform fields as follows:

- 1) Add a **Title** (this title will appear above the content on the form page).

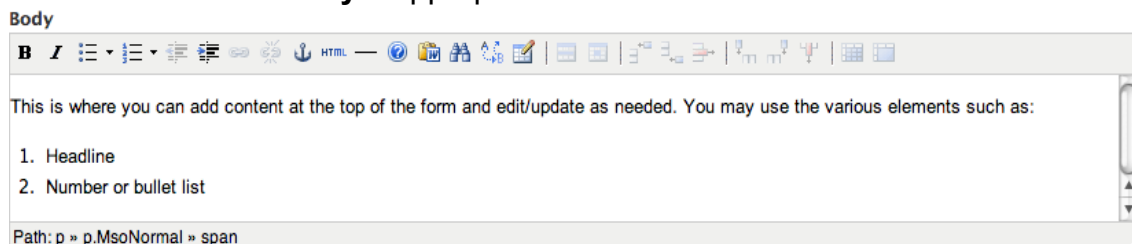
Title *

- 2) Select the **Section** (the top level of your section of the web).

Section *

- 3) Add content to the **Body** if appropriate.

Body

A screenshot of the webform body editor. It features a rich text editor toolbar with various icons for bold, italic, list creation, and linking. The main text area contains the instruction: 'This is where you can add content at the top of the form and edit/update as needed. You may use the various elements such as:' followed by a numbered list: '1. Headline' and '2. Number or bullet list'. At the bottom, a status bar shows the path: 'Path: p » p.MsoNormal » span'.

- 4) Scroll down to the bottom of the page; select the **Parent Item** pull-down menu, and then click on the section you want the new page to appear.

Menu settings
Drupal Webform Example

Revision information
New revision

☒ Provide a menu link

Menu link title
Drupal Webform Example

☐ Hide link in navigation

Parent item
-- Communications

Weight
0

Menu links with smaller weights are displayed before links with larger weights.

Classes
Enter additional classes to be added to the link.

Save Preview

- 5) Click on **Save**.

- 6) After you save the page, you should get to this page, where you will add the field name and type components, and indicate if the field is mandatory.

Drupal Webform Example Directories Login Calendar Camps VIEW EDIT WEBFORM RESULTS

Home » Communications Form components E-mails Form settings

✓ • Webform *Drupal Webform Example* has been created.
• The new webform *Drupal Webform Example* has been created. Add new fields to your webform with the form below.

Show row weights

LABEL	TYPE	VALUE	MANDATORY	OPERATIONS
No Components, add a component below.				
+ New component name	Textfield		<input type="checkbox"/>	Add

2. Webform Components

You may add any number of fields to a node for the end-user can fill out:

NAME	DESCRIPTION
Date	Presents month, day, and year fields
E-mail	A special textfield that accepts email addresses
Fieldset	Fieldsets allow you to organize multiple fields into groups
File	Allow users to upload files of configurable types
Grid	Allows creation of grid questions, denoted by radio buttons
Hidden	A field which is not visible to the user, but is recorded with the submission
Markup	Displays text as HTML in the form; does not render a field
Number	A numeric input field (either as textfield or select list)
Page break	Organize forms into multiple pages
Select options	Allows creation of checkboxes, radio buttons, or select menus
Textarea	A large text area that allows for multiple lines of input
Textfield	Basic textfield type
Time	Presents the user with hour and minute fields. Optional am/pm fields

Creating a Textfield

A text field is a large text area that allows for multiple lines of input.

1. Enter the question to be asked under Label, i.e.; **First Name**
2. Select **Textfield** in type.
3. Check the **Mandatory** box if the question is mandatory.
4. Click on **Add**

LABEL	TYPE	VALUE	MANDATORY	OPERATIONS
No Components, add a component below.				
<input type="text" value="First Name"/>	<input type="text" value="Textfield"/>		<input checked="" type="checkbox"/>	<input type="button" value="Add"/>

5. Scroll down to the bottom of the page to **DISPLAY**.

▼ **DISPLAY**

6. The width of the textfield box can be changed by entering a number. The size of the box can be edited by entering a number under **Width**.

▼ **DISPLAY**

Width
<input type="text" value="30"/>

7. Select **Save Component**.
8. Add the second textfield component **Last Name** with a width of 35

Last Name *
<input type="text"/>

Creating an Email Field

An email field is a special textfield that accepts email addresses.

<input type="text" value="Email"/>	<input type="text" value="E-mail"/>	<input checked="" type="checkbox"/>	<input type="button" value="Add"/>
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1. Enter the question to be asked under Label, i.e.; **Email**.
2. Select **E-mail** in type.
3. Check the **Mandatory** box if the question is mandatory.
4. Click **Add**.

5. Under **Default value**, you can type in **@mtholyoke.edu** if the form is to be filled by a Mount Holyoke College affiliated member. This extension will be automatically entered into the field and the user can just put in their Mount Holyoke College username. This is not necessary,

Label *

Email

This is used as a descriptive label when displaying this form element.

Field Key *

email

Enter a machine readable key for this form element. May contain only alphanumeric characters and underscore attribute of the form element. This value has no effect on the way data is saved, but may be helpful

Default value

@mtholyoke.edu

The default value of the field.

▶ **TOKEN VALUES**

☐ User email as default

Set the default value of this field to the user email, if he/she is logged in.

Add Field Containing Numbers

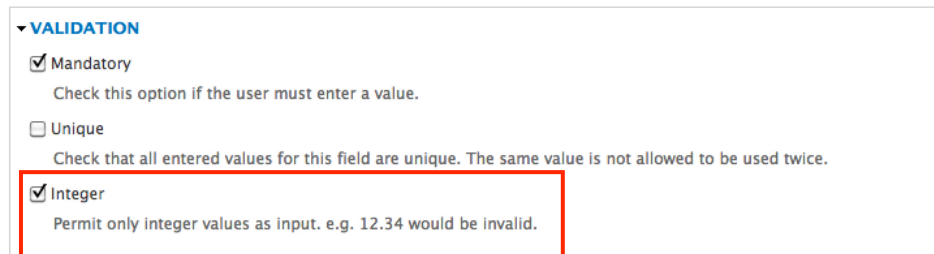
A field containing numbers is a numeric input field (either as textfield or select list).

1. Enter the question under Label; i.e., **Current Age**
2. Select **Number**
3. Click on **Add**



The screenshot shows a webform builder interface. On the left, there is a plus icon and a text input field labeled 'Phone'. In the center, there is a dropdown menu with 'Number' selected. On the right, there is an 'Add' button. All three elements are highlighted with red boxes.

4. Check the box on the left of **Integer**



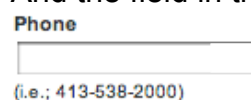
The screenshot shows the 'VALIDATION' section of the webform builder. It contains three options: 'Mandatory' (checked), 'Unique' (unchecked), and 'Integer' (checked). The 'Integer' option is highlighted with a red box. Below each option is a brief description of its function.

5. To enter a description for an example for the user, write this under **Description**



The screenshot shows the 'Description' field of the webform builder. It contains the text '(i.e.; 413-538-2000)'. The field is highlighted with a red box. Below the field is a short description of the field used as help for the user when he/she uses the form.

And the field in the webform will look like this:



The screenshot shows the final webform field. It is a text input field labeled 'Phone'. Below the field is the text '(i.e.; 413-538-2000)'.

6. Select the **Text field** option. This allows the user to input the number.
Select **None** for **Thousands separator** otherwise the number will be separated in thousands

▼ **DISPLAY**

Element type

☒ Text field

☐ Select list

A minimum and maximum value are required if displaying as a select.

Prefix text placed to the left of the field

Examples: \$, #, -.

Postfix text placed to the right of the field

Examples: lb, kg, %.

Decimal places

Automatic

Automatic will display up to 4 decimals places if needed. A value of "2" is common to format currency amounts.

Thousands separator

✓ Comma (,)
Period (.)
Space ()
None

Period (.)

Label display

Above

Determines the placement of the component's label.

☐ Private

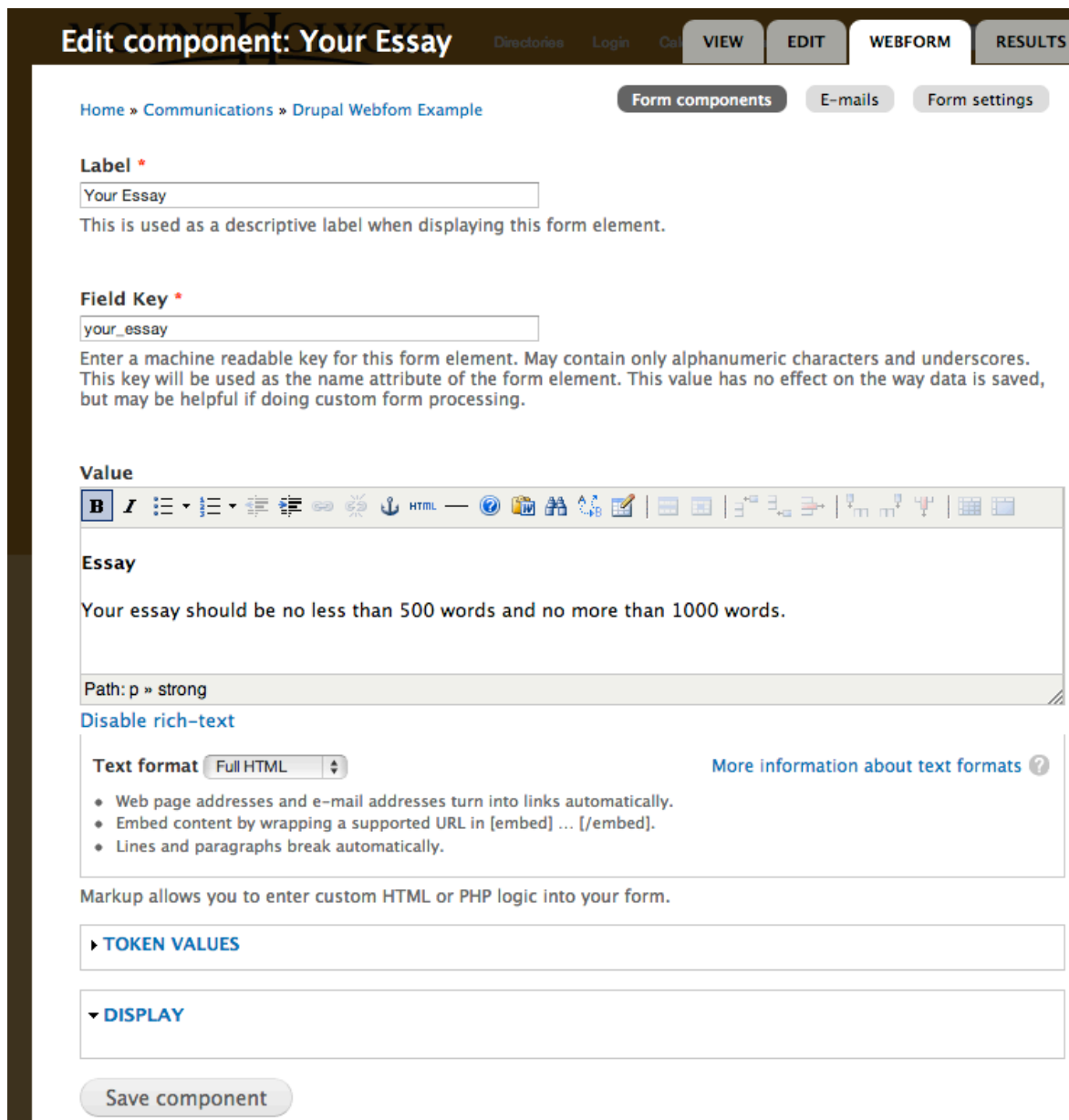
Private fields are shown only to users with results access.

Markup

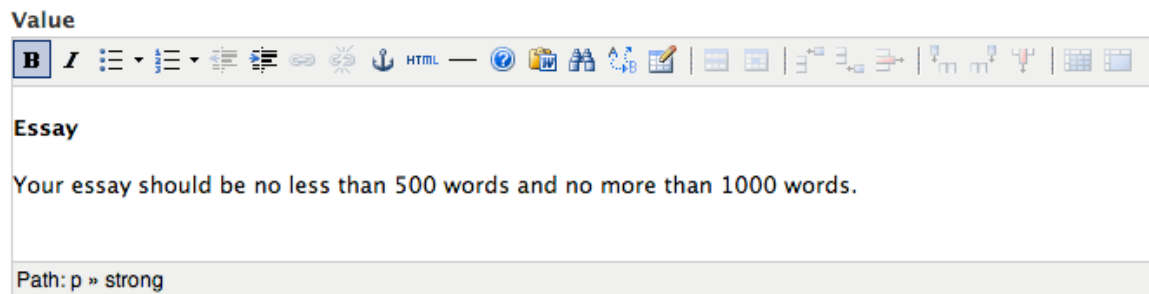
A markup displays text as HTML in the form; does not render a field.

A form element for creating a markup. It consists of a plus icon, a text input field containing "Your Essay", a dropdown menu with "Markup" selected, a checkbox, and an "Add" button.

1. Add the label type in the question.
2. Select the type of label it is from the pull-down menu; i.e., markup.
3. Click on **Add**; you will be redirected to the Edit component.

A screenshot of the "Edit component: Your Essay" page in a Drupal webform. The page has a dark header with navigation links: Home » Communications » Drupal Webform Example, Form components, E-mails, and Form settings. The main content area is titled "Edit component: Your Essay" and has tabs for VIEW, EDIT, WEBFORM, and RESULTS. The "EDIT" tab is active. The form is divided into sections: "Label *" with a text input field containing "Your Essay" and a description "This is used as a descriptive label when displaying this form element."; "Field Key *" with a text input field containing "your_essay" and a description "Enter a machine readable key for this form element. May contain only alphanumeric characters and underscores. This key will be used as the name attribute of the form element. This value has no effect on the way data is saved, but may be helpful if doing custom form processing."; "Value" section with a rich text editor containing the text "Essay" and "Your essay should be no less than 500 words and no more than 1000 words." Below the editor is a "Path: p » strong" field and a "Disable rich-text" checkbox. A "Text format" dropdown is set to "Full HTML" with a link to "More information about text formats". Below this is a list of bullet points: "Web page addresses and e-mail addresses turn into links automatically.", "Embed content by wrapping a supported URL in [embed] ... [/embed].", and "Lines and paragraphs break automatically." A note states "Markup allows you to enter custom HTML or PHP logic into your form." At the bottom are two expandable sections: "TOKEN VALUES" and "DISPLAY", and a "Save component" button.

4. In the Edit component, the **label** details and the field key are auto-filled from the information that you added to the label.
5. Add appropriate content to the **Value** section of the form. If appropriate, change the format from paragraph to Heading 2, etc.



Value

B *I* [List Icons] [Link Icon] [Unlink Icon] [HTML Icon] [Image Icon] [Table Icon] [Form Icons]

Essay

Your essay should be no less than 500 words and no more than 1000 words.

Path: p » strong

6. Click on **Save**.

Select Options

The select options field type allows you to create checkboxes, radio buttons, or menus:

Select list (single selection) – choose the "Select options" type, enter the values and label, and make sure "List box" option is checked (on).

Select list (multiple selection) - choose the "Select options" type, enter the values and label, then choose the "Multiple" advanced setting, and make sure "Listbox" option is checked (on).

Checkbox - choose the "Select options" type, enter the value and label, then choose the "Multiple" advanced setting (even if you just want one checkbox to appear), and make sure "Listbox" option is not on.

Checkboxes (multiple) - choose the "Select options" type, enter the values and label, then choose the "Multiple" advanced setting, and make sure "Listbox" option is not on.

Radio buttons - choose the "Select options" type, enter the values and label. Make sure both the 'Multiple' advanced setting and "Listbox" option settings are not on.


To add a Select Option

1. Type the question under the Label component.
2. Select **Select options** under Type.
3. If it is mandatory for that question to be answered, check the box under Mandatory.
4. Click on **Add**.



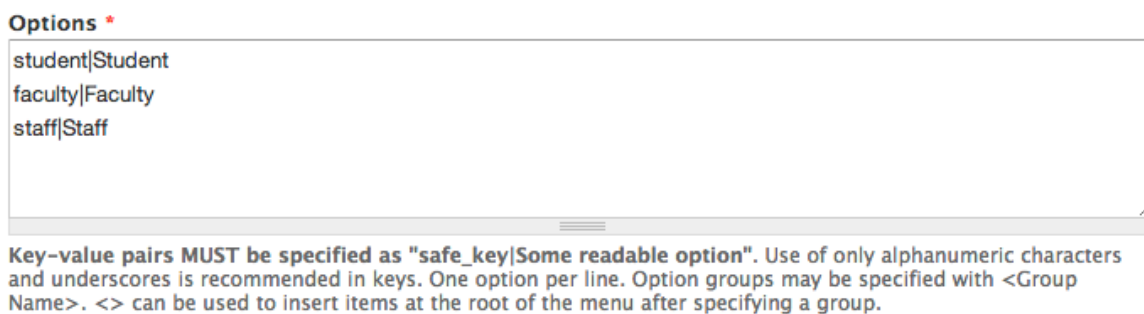
A screenshot of a webform builder interface. It shows a text input field with the placeholder text 'Affiliation'. To its right is a dropdown menu currently set to 'Select options'. Further right is a small square icon, and to the far right is a rounded 'Add' button.

5. The options for the questions should be entered in the Options section
6. The safe key value and the **Readable option** should be entered as follows:
 - The safe key value should be entered in lowercase. If there is a space in between two words, it should be indicated with an underscore (_), i.e.; **fall_entrant**.
7. After the safe key has been written, the pipe symbol should be entered (|) followed by the more Readable Option.
8. The Readable Option should be written the way it will be read by the user. For example, Student.
For example, the first option should be **student|Student**



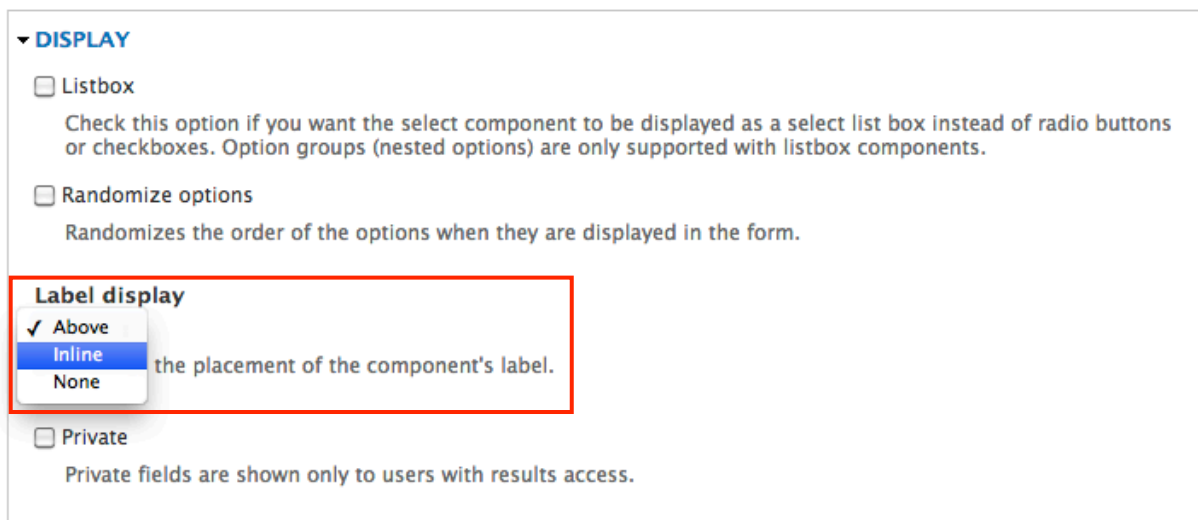
A screenshot of the 'Options' section in the form builder. It shows a text area with three lines of text: 'student|Student', 'faculty|Faculty', and 'staff|Staff'. The title 'Options' is at the top left with a red asterisk.

9. The other options should be entered as described earlier on. Each option should be entered on the next line.



A screenshot of the 'Options' section, similar to the previous one but with a scroll bar at the bottom. It shows the same three lines of text: 'student|Student', 'faculty|Faculty', and 'staff|Staff'. Below the text area, there is a small text box containing instructions: 'Key-value pairs MUST be specified as "safe_key|Some readable option". Use of only alphanumeric characters and underscores is recommended in keys. One option per line. Option groups may be specified with <GroupName>. <> can be used to insert items at the root of the menu after specifying a group.'

10. Click on the **Label display** pull-down menu and select **Inline**. This allows options, which are just a few to be arranged neatly in one line. For example, a question, which has two options, can be arranged **inline**.



▼ **DISPLAY**

☐ Listbox
Check this option if you want the select component to be displayed as a select list box instead of radio buttons or checkboxes. Option groups (nested options) are only supported with listbox components.

☐ Randomize options
Randomizes the order of the options when they are displayed in the form.

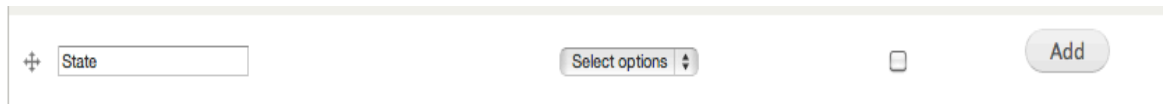
Label display
✓ Above
Inline the placement of the component's label.
None

☐ Private
Private fields are shown only to users with results access.

11. Click on **Save component** at the bottom of the screen.

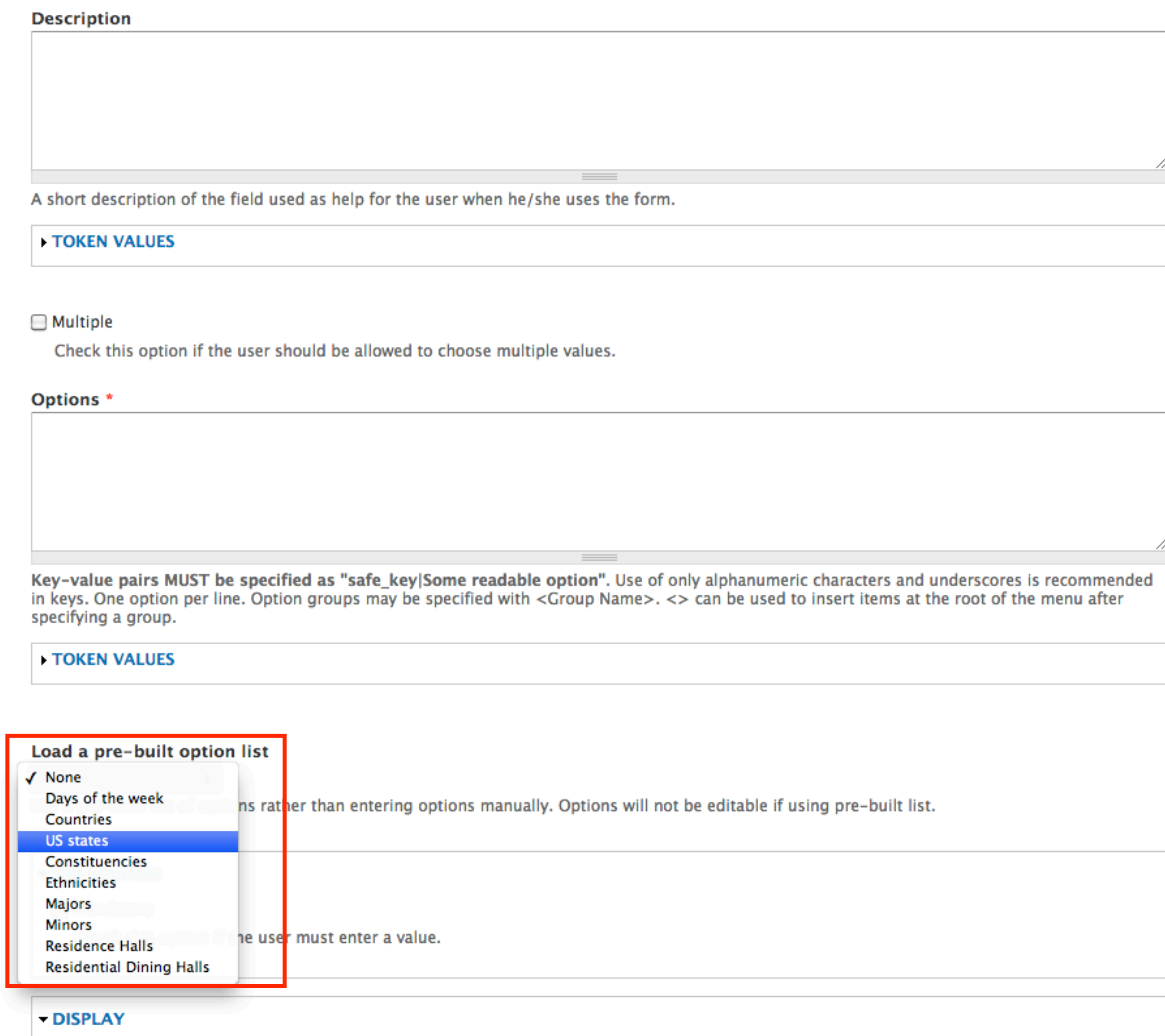
Create a Select Option with Pre-Built Options

1. Enter the question. For example, **State**.
2. Select **Select options**.
3. Click on **Add**.



The screenshot shows a horizontal bar with a text input field containing the word "State". To the right of the input field is a button labeled "Select options" with a small downward arrow. Further right is a small square icon, and at the far right is a rounded button labeled "Add".

4. Select the **Load a pre-built option list** pull-down menu.



The screenshot shows the form builder interface. At the top is a text area labeled "Description" with a placeholder text: "A short description of the field used as help for the user when he/she uses the form." Below this is a button labeled "TOKEN VALUES".

Below the "TOKEN VALUES" button is a checkbox labeled "Multiple" with the text "Check this option if the user should be allowed to choose multiple values." below it.

Below the "Multiple" checkbox is a section labeled "Options *". It contains a large text area for entering options. Below this text area is a button labeled "TOKEN VALUES".

Below the "Options *" section is a pull-down menu labeled "Load a pre-built option list". The menu is open, showing a list of options: "None", "Days of the week", "Countries", "US states", "Constituencies", "Ethnicities", "Majors", "Minors", "Residence Halls", and "Residential Dining Halls". The "US states" option is highlighted.

Below the pull-down menu is a button labeled "DISPLAY".

5. Select the pre-built list; for example, US states (the options area will pre-fill from the pre-built list).

Options *
AL|Alabama
AK|Alaska
AS|American Samoa
AZ|Arizona
AR|Arkansas

Key-value pairs MUST be specified as "safe_key|Some readable option". Use of only alphanumeric characters and underscores is recommended in keys. One per line. Option groups may be specified with <Group Name>. <> can be used to insert items at the root of the menu after specifying a group.

▶ **TOKEN VALUES**

Load a pre-built option list

US states

Use a pre-built list of options rather than entering options manually. Options will not be editable if using pre-built list.

6. Check box on the left of **Listbox**. This is under the Display section.

▼ DISPLAY
☒ Listbox
Check this option if you want the select component to be of listbox type instead of radio buttons or checkboxes.
☐ Randomize options
Randomizes the order of the options when they are displayed in the form.
Label display
Above

7. Click on **Save component**.
8. **Save** the changes made on the webform.

Add Text Area.

1. Enter the question under **Label**; i.e., **Hobbies**
2. Select **Text area**
3. Click on **Add**



A screenshot of the Drupal Webform builder interface. It shows a toolbar with a plus icon, a text input field containing 'Feedback/update', a dropdown menu with 'Textarea' selected, a small square icon, and an 'Add' button. The 'Add' button is highlighted with a red rectangular box.

4. Check the box on the left **Resizable**. This makes sure that the size of the box can be edited.

Height

Height of the textarea. Leaving blank will use the default size.

☒ Resizable

Make this field resizable by the user.

☐ Hide label

Do not display the label of this component.

☐ Disabled

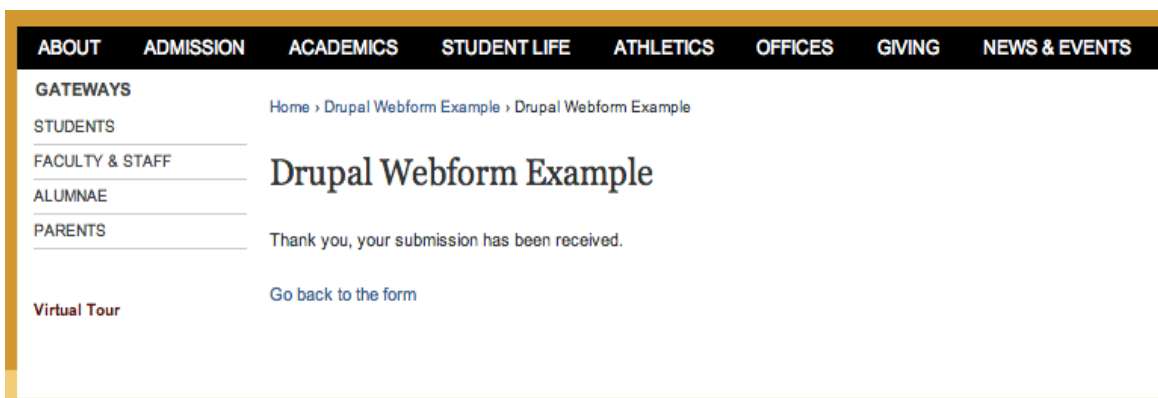
Make this field non-editable. Useful for setting an unchangeable default value.

☐ Private

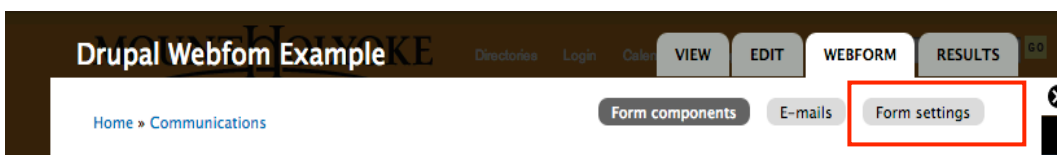
Private fields are shown only to users with results access.

Customize content on receipt page

1. Once the form is filled and the user has submitted it, the default confirmation message they see is:

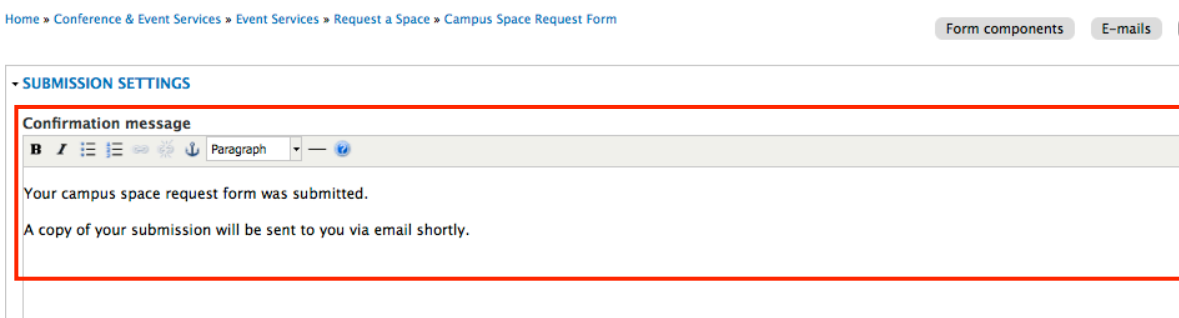


2. To customize content, click on **Form Settings**.



3. Add your message in the **Confirmation message** area.

It is useful to the form submitter if the confirmation page indicates “A copy of your submission form will be sent to you via email shortly.” You must make the form function this way for that to happen; see how to do this in the next section” Email form submission results to person who submitted form.



4. Click **Save**

Assign Email Recipients

You may receive the data from form submission via email and/or by downloading the data from the webform in Drupal via the **Results** tab. Note: only one person per form has access to view the webform database.

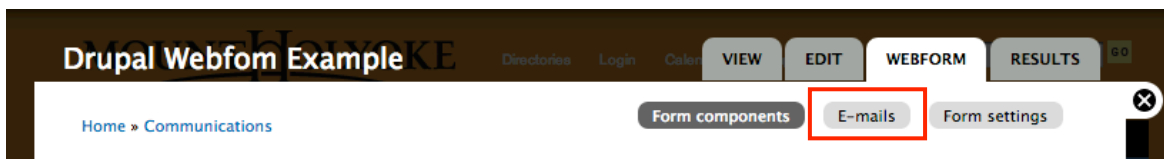
You may setup webforms to do any or all of the following:

- Email form submissions to a mail list, i.e., eventservices@metholyoke.edu.
- Email a summary of the form submission to the person who submitted the form, i.e. Value of "Email."
- Email form submissions to one or more individuals in your department, i.e., tchamber@metholyoke.edu.

E-MAIL TO	SUBJECT	FROM	OPERATIONS
eventservices@metholyoke.edu	Form submission from: Campus Space Request Form	"Value of Name" <Value of "Email">	Edit Delete
Value of "Email"	Form submission from: Campus Space Request Form	"Value of Name" <Value of "Email">	Edit Delete
tchamber@metholyoke.edu	Form submission from: Campus Space Request Form	"Value of Name" <Value of "Email">	Edit Delete
<div><input checked="" type="radio"/> Address: <input type="text" value="email@example.com"/></div> <div><input type="radio"/> Component value: <input type="text" value="Pre-event Time (set up)"/></div> <div><input type="button" value="Add"/></div>			

Set form so you or someone in your department receives results via email:

1. Go to the **Webform** tab and then click on **Emails**, which can be found on the top of the **Edit Component** page.



2. Select **Address**, and your MHC email address (i.e., tchamber@metholyoke.edu), and then select **Add**.

☒ Address:

3. Complete the **Email Header Details** as follows:

a. **Email subject**

You may leave the default or add a custom subject. This is the text you will see as the subject in your email.

E-MAIL HEADER DETAILS

E-mail subject

☐ Default: *Form submission from: Drupal Workshop Registration*

☒ Custom:

☐ Component:

Any textfield, select, or hidden form element may be selected as the subject for e-mails.

b. **Email from address**

Select Component and use the pull-down menu to select the email field of the person who will complete the form.

E-mail from address

☐ Default: *drupal@mtholyoke.edu*

☐ Custom:

☒ Component:

Any email, select, or hidden form element may be selected as the sender's e-mail address.

c. Email from name

Custom - enter the key values for the first and last name of the person who will complete the form; i.e., %value[first_name] %value[last_name].

E-mail from name

☐ Default: *Mount Holyoke College*

☒ Custom:

☐ Component:

Any textfield, select, or hidden form element may be selected as the sender's name for e-mails.

Note: match the form components EXACTLY to the key field label.

[Home](#) » [Web Help](#) » [Workshops & Support](#) » [Drupal Workshops](#)

Form components

Label *

This is used as a descriptive label when displaying this form element.

Field Key *

Label *

This is used as a descriptive label when displaying this form element.

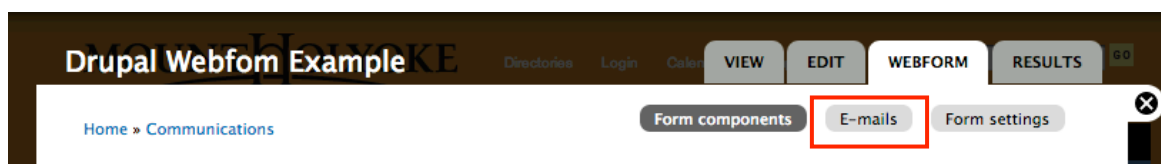
Field Key *

4. Save email settings. The next screen should look similar to this:

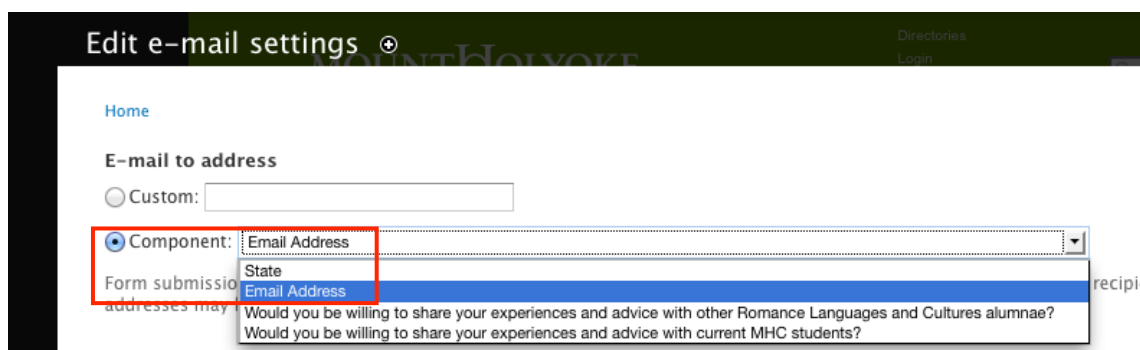
tchamber@mtholyoke.edu	Drupal workshop registration	"%value[first_name] %value[last_name]" <Value of "MHC email">
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Set form to email submission results to person who submitted form:

1. Go to the **Webform** tab and then click on **Emails**, which can be found on the top of the **Edit Component** page.



2. Select **Email Address** (or whatever field name was assigned for the person filling in the form to add) from the pull-down menu, then select **Add**. Note: the form submitter must include their email on the form to receive the email, so you may want to make email a required field or indicate it is optional, but required if they want a copy of their form sent.



3. Complete the Email Header Details as follows (see screen shots on previous page):
 - a. **Email subject** – you may leave the default or add a custom subject. This is the text you will see as the subject in your email.
 - b. **Email from address** – select Component and use the pull-down menu to select the email field of the person who will complete the form.
 - c. **Email from name** – select Custom and enter the key values for the first and last name of the person who will complete the form; i.e.,
%value[first_name] %value[last_name]
 - d. **Save email settings.**